

Request for Proposal (RFP): Specification for Marketing Automation Professional Services

Introduction:

Palladium invites qualified vendors to submit proposals for providing a comprehensive marketing automation platform service, including setup and ongoing management. The purpose of this RFP is to solicit competitive proposals from vendors with proven expertise in delivering scalable and effective marketing automation solutions.

1. Objectives:

- 1.1. Implement a robust marketing automation platform to streamline marketing processes.
- 1.2. Support onboarding of customers onto programme
- 1.3. Engaging customers whilst on programme
- 1.4. Collecting feedback and questionnaires
- 1.5. SMS to enable nudges and prompts along the customer journey

2. Scope of Work:

The selected vendor will be responsible for:

- 2.1. Conducting a comprehensive assessment of our customer journey, goals, and challenges.
- 2.2. Configuring the chosen marketing automation platform to align with our business needs and objectives.
- 2.3. Integrating the platform with existing CRM systems, websites, and other relevant tools using bespoke APIs where necessary
- 2.4. Customizing automation workflows, email templates, and lead scoring models.
- 2.5. Creating data tables and structures for the new programme
- 2.6. Implementing advanced segmentation strategies to personalize marketing communications.
- 2.7. Monitoring campaign performance in real-time and making data-driven adjustments for optimization.
- 2.8. Implementing A/B testing and other techniques to improve campaign effectiveness.
- 2.9. Developing lead nurturing programs to guide customers through the customer journey and keeping them engaged
- 2.10. Providing regular reports on key performance metrics, campaign effectiveness, and customer satisfaction.
- 2.11. Conducting in-depth analysis to identify trends, opportunities, and areas for improvement.

3. Deliverables:

- 3.1.1. Comprehensive assessment report.
- 3.1.2. Fully configured and customized marketing automation platform.
- 3.1.3. Documentation and training materials for platform usage.
- 3.1.4. Regular campaign reports and performance updates.

4. Vendor Qualifications:

- 4.1.1. Demonstrated experience in implementing marketing automation solutions for businesses of similar size and complexity.
- 4.1.2. Expertise with leading marketing automation platforms
- 4.1.3. Proven track record of delivering measurable results in terms of lead generation, customer engagement, and revenue growth.
- 4.1.4. Strong technical capabilities, including integration and customization expertise.
- 4.1.5. Excellent communication and project management skills.

5. Proposal Submission:

Please submit a proposal of no longer than 4 pages of A4 plus accompanying diagrams (e.g. Gantt Charts) by addressing points 5.1 through to 5.7 below.

Interested Website Development organisations are requested to submit their proposals electronically to Karl Crossley karl.crossley@thepalladiumgroup.com no later 15th March 2024 by 17:00 GMT.

Commercials - We are seeking proposals before analysis of the process. To gain a fair benchmark on commercials we would like you to price up a marketing automation implementation of medium complexity with a 7 months campaign. This needs to be integrated into a Case Management System. Assume the whole project takes 8 weeks. Please break down the day rates of different capabilities e.g. developer, business analyst, project manager and indicate the level of input from any roles detailed.

- 5.1 Please also include clear commercials for ongoing support over 4 years and service level agreements that would be provided
- 5.2 Company profile and relevant experience in Marketing Automation implementation.
- 5.3 Case studies or examples of successful Marketing Automation implementations.
- 5.4 Approach and methodology for this project, including timeline and milestones.
- 5.5 Detailed breakdown of costs and pricing.
- 5.6 The attached Palladium Standard Technical Requirement doc
- 5.7 References from past clients.

6 Proposals will be evaluated based on the following criteria:

- 6.1 Technical expertise and experience
 - 6.2 Alignment with project objectives and scope of work.
 - 6.3 Proposed methodology and approach.
 - 6.4 Cost-effectiveness and value proposition.
7. Palladium International reserves the right to accept or reject any proposal, to waive any irregularities, and to award the contract in whole or in part if deemed in the best interest of the company. The selected vendor will be required to enter into a formal agreement outlining the terms and conditions of the engagement.
8. For inquiries or clarification regarding this RFP, please contact:

Karl Crossley karl.crossley@thepalladiumgroup.com

We are happy to take clarification question up until 5pm on the 8th March 2024 but all questions and answers will be shared anonymously with all bidders.